

4.3. Eligibility

09/19/2025 2:10 pm CDT

The Eligibility section of Plan Specifications is where the user will set exclusions (such as union, leased employees, nonresident alien, other), indicate whether the eligibility computation period will switch to the plan year, review the age and service eligibility rules for each source, break-in-service rules and confirm the special participation date (as applicable to the plan). For specific information regarding each option in this section click the applicable help text bubble.

▼ Eligibility	
▶ Exclusions	
▼ Age Service Rules	
Eligibility Computation Period	
Eligibility Computation Period switch to Plan Year:	 ☒ Yes / ☐ No
Elective Deferrals/Voluntary Contributions	
Minimum age requirement for Elective Deferrals/Voluntary Contributions:	 <input type="text"/>
Minimum service requirement for Elective Deferrals/Voluntary Contributions:	 None <input type="button" value="v"/>
+	
+	
Frequency of entry dates for Elective Deferrals/Voluntary Contributions:	 Immediate <input type="button" value="v"/>
+	
Matching Contributions	
Minimum age requirement for Matching Contributions:	 <input type="text"/>
Minimum service requirement for Matching Contributions:	 None <input type="button" value="v"/>
+	
+	
Frequency of entry dates for Matching Contributions:	 Immediate <input type="button" value="v"/>
+	
Profit Sharing Contributions	
Minimum age requirement for Nonelective Contributions:	 <input type="text"/>
Minimum service requirement for Nonelective Contributions:	 None <input type="button" value="v"/>
+	
+	
Frequency of entry dates for Nonelective Contributions:	 Immediate <input type="button" value="v"/>
+	
Qualified Non-Elective Contributions	
Indicate extent to which Participants Eligible for Elective Deferrals are also eligible for QNECs	 Nonhighly Compensated Employees only <input type="button" value="v"/>
▼ Miscellaneous	
Break in Service	
Rule of parity. If an Employee does not have any nonforfeitable right to Employer contributions, exclude eligibility service before a period of five (5) consecutive One-Year Breaks in Service/Periods of Severance:	 ☐ Yes / ☒ No
One-year holdout. If an Employee has a One-Year Break in Service/Period of Severance, exclude eligibility service before such period until the Employee has completed a Year of Eligibility Service after returning to employment with the Employer:	 ☐ Yes / ☒ No

